

## LOW-INCOME DESIGNATION APPLICATION

Credit Union's Name: \_\_\_\_\_

Charter # \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Is your credit union's field of membership community, single common bond (associational or occupational), or multiple common bond (more than one group each having a common bond of association and/or occupation)?

\_\_\_\_\_

What percentage of your total members meet the low-income designation requirement regarding individual income/household income?

\_\_\_\_\_

What method did you use to determine your members meet the low-income designation requirement regarding individual income/household income?

\_\_\_\_\_

Please send supporting documentation with your request which include:

Zip Code Information - A report listing the total number of members residing in qualifying low-income zip codes. You must include the summary page of the share trial balance showing total credit union members.

Loan Surveys - A report listing the total number of borrowers meeting the income measurement standard. Borrowers must represent a majority of the credit unions members. You must include the summary page of the loan and share trial balance showing total number of loans outstanding and total credit union members.

Membership Surveys - A report listing the total number of members meeting the income measurement standard. You must include the summary page of the share trial balance showing total credit union members.

Census Bureau Information - A printout of the income level of the area (for communities).

Submit your low-income designation application with supporting documentation to the Regional Director as follows:

Regional Director Robert E. Blatner, Jr.  
National Credit Union Administration  
2300 Clayton Road, Suite 1350  
Concord, CA 94520

If you have questions or need some assistance, please contact the Division of Insurance at (925) 363-6200.

\_\_\_\_\_  
Your Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title